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**Citrus** 

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2001

Approved by:

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#### Report Highlights: Prices for U.S. grapefri

Prices for U.S. grapefruits are up 15-20 percent, and despite concerns over avoiding excess inventory, sales are brisk and likely to reach 210,000 metric tons this year. While exports of lemons are likely to remain unchanged, this year, exports of U.S. fresh oranges are likely go up by 7 - 8 percent, according to Tokyo's traders.

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# The 2000/01 High Quality Crop of U.S. Grapefruit Made a Successful Marketing in Japan

This season's U.S. grapefruit made a strong impression with Japanese traders, due largely to high quality and reasonable pricing, and is currently trading at prices 15 - 20 percent higher than last year at Japan's major wholesale market. The 2000/01 crop of Florida grapefruit had an excellent taste, well balanced Brix levels and acidity, and kept both Japanese traders and consumers happy.

Both white and ruby grapefruit are currently traded at Tokyo's Ohta Wholesale Market at 3,300 - 3,200 yen (\$26.82 - \$26.01) for a carton (17 kilograms) of sizes 27 and 32. Sizes 36 and 40 are traded at 3,100 - 2,700 yen (\$25.20 - \$21.95) and size 48 at around 2,400 yen (\$19.51). Retail prices are fairly stable reflecting stable supply and stable quality. Tokyo's major supermarket sells at around 100 yen (\$0.81) for a medium sized fruit, and 120 - 150 yen (\$0.97 - \$1.21) for a large sized fruit.

The Japanese imports of U.S. grapefruit is projected to reach 210,000 metric tons, with Florida alone likely to reach 170,000 metric tons (approximately 10 million cartons,) according to Japanese traders. However, this season Japanese importers have been extremely cautious on their purchasing volume in order to avoid excessive inventory, a problem last season. Demand for U.S. grapefruit is fairly strong this season due to high quality and fruits are moving smoothly in Japan's distribution channels. Japanese purchasing of grapefruit likely to shift from Florida sourced to California sourced towards mid-June.

The quality of domestic citrus products was good this season (the domestic citrus season completed in mid-March), however, the price for domestic citrus was relatively high and many Japanese retailers shifted to reasonably priced U.S. products early in the season.

# Israeli Sweetie is Stabilized at Approximately One Million Cartons in the Japanese Market

Israeli sweetie was rather quietly marketed this season from November through January, with the total disposition of approximately 15,800 metric tons (930,000 cartons). Israeli sweetie were popular for the newness and the rarity in Japanese market until a few years ago. However, many traders find it increasingly difficult to further penetrate the Japanese market.

Israeli sweeties were traded at around 2,500 yen (\$20.32) for a carton (17 kilogram) of sizes 32 and 36, and 2,100 yen (\$17.07) for size 40s in January, 2001. Retail prices are similar to the prices of U.S. grapefruits and Tokyo's major super market sold at 100 - 150 yen (\$0.81 - \$1.21) for a large sized fruit and 78 - 130 yen (\$0.63 - \$1.05) for a medium sized fruit.

# Japanese Fresh Orange Imports Projected to Reach 140,000 Tons in 00/01

The good taste of U.S. fresh oranges has supported strong sales this season; sales are likely go up by 7 - 8 percent, according to Tokyo's traders. The movement of U.S. fresh oranges is fairly stable in Japan's distribution channels due to the stable supply from the United States. Sales of California Navels, which had a good quality with high Brix levels, were good this season. With the Navels market finishing in late April, sales are now switching to Valencias. Japanese sales of fresh oranges have been fairly strong since early April, as

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Japanese temperatures started to climb. Strong sales are expected to continue with Valencias, although traders are cautious about import volume in order to avoid excessive stocks.

Currently, California Valencias are traded at Tokyo's Ohta Wholesale Market at around 3,000 yen (\$24.39) for a carton (17 kilograms) of sizes, 56, 72 and 88, and around 2,500 yen (\$20.32) for size 113s. Navels were also traded at similar prices in April. California Valencias are presently sold at 88 - 100 yen (\$0.71 - \$0.81) for a bag of 6 medium sized fruit.

# Imports of Spanish Orange Expected to Decline Marginally

The supply of Spanish oranges is expected to decline this season due to poor weathers in the growing regions in Spain, according to Japanese traders. Spanish oranges are fairly popular among Japanese traders as a sweet taste orange and are often sold as gifts at premium prices. Spanish Navels were sold until late April this season, with sales switching to Valencias in early May. Currently, Spanish Valencias are traded at Tokyo's Ohta Fresh Produce Market at 3,300 yen (\$26.82) for a carton (14 kilograms) of sizes, 50, 56, 66 and 78. Navels were also traded at a similar price this season.

#### Japanese Fresh Lemon Market Keeps Steady

California continues to supply remains fairly smooth with good quality lemon, this season. Currently there are 140,000 cartons (2,380 MT) of on-hand stocks in the nation's cold storage warehouses. Japanese importers are closely monitoring stocks and are expected to be careful about import volume this season. Japanese import of lemons this season is expected to be unchanged or slightly less than last year, as an adjustment to last years oversupply, according to traders at Tokyo's Ohta Wholesale Market.

Currently, Japanese lemon market is stable and wholesale prices are relatively strong, due largely to good quality fruit. California lemons are traded at Ohta Market at around 4,000 yen (\$32.52) for a carton (17 kilograms) of size 95, 115, 140 and 165. Tokyo supermarket retails fresh lemons at 90 - 100 yen (\$0.73 - \$0.81) for a medium sized fruit, and at 180 - 200 yen (\$1.46 - \$1.62) for a plastic bag of 3 lemons.

## **Japanese Citrus Beverage Market Continues to Recover**

Japan's largest consumption of fruit beverage by type is a soft drink with some content of natural fruit juice, followed by a 100 percent natural fruit juice product. The products that contain 10 - 30 percent natural fruit juice showed a 135 percent increase in production in CY 2000 over CY 1999, and continue to grow strongly this season. The trend in Japan's fruit beverage market is for Japanese beverage manufactures to continue to market new soft drink products containing 10 - 30 percent natural fruit juice this season. Kirin Tropicana and Minute Maid, Japan's leading fruit juice manufacturers, will launch big sales promotions for 100 percent natural orange juice this season. Japanese traders hope for a good market recovery for 100 percent fruit juice products.

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# **PS&D** Tables and Trade Matrices

Fresh Orange PS&D Table

PSD Table						
Country	Japan					
Commodity	Fresh Oranges				(HECTARE TREES)(100	· `
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Area Planted	1720	1720	1570	1570	1440	1440
Area Harvested	1700	1700	1560	1560	1430	1430
Bearing Trees	1020	1020	936	936	858	858
Non-Bearing Trees	36	36	18	18	18	18
TOTAL No. Of Trees	1056	1056	954	954	876	876
Production	21	21	21	21	21	21
Imports	96	96	131	129	140	140
TOTAL SUPPLY	117	117	152	150	161	161
Exports	0	0	0	0	0	0
Fresh Dom. Consumption	115	115	150	148	159	159
Processing	2	2	2	2	2	2
TOTAL DISTRIBUTION	117	117	152	150	161	161

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### **Orange Juice PS&D Table**

PSD Table						
Country	Japan			65	Degrees Brix	
Commodity	Juice, Orange				(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Deliv. To Processors	2	2	2	2	2	2
Beginning Stocks	15000	15000	5000	5000	10000	10000
Production	200	200	200	200	200	200
Imports	81789	81789	102328	101181	100000	105000
TOTAL SUPPLY	96989	96989	107528	106381	110200	115200
Exports	0	0	0	0	0	0
Domestic Consumption	91989	91989	97528	96381	98000	100200
Ending Stocks	5000	5000	10000	10000	12200	15000
TOTAL DISTRIBUTION	96989	96989	107528	106381	110200	115200

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**Fresh Orange Import Trade Matrix** 

Fresh Orange Im			
Import Trade			
Matrix			
Country	Japan		
Commodity	Fresh		
	Oranges		
Time period	OctSept.	Units:	Metric Tons
Imports for:	1998		1999
U.S.	52220	U.S.	110374
Others		Others	
South Africa	13846	South Africa	8257
Australia	12800	Australia	6604
Spain	9512	Spain	2949
Mexico	5247	Mexico	67
Swaziland	43	Swaziland	13
Chile	439	New Zealand	162
Israel	1527	Chile	782
Cuba	120		
New Zealand	124		
Total for Others	43658		18834
Others not Listed	21		74
Grand Total	95899		129282

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**Orange Juice Import Trade Matrix** 

Orange Juice Imp	ort Traue Ma	LUTIX	
Import Trade			
Matrix			
Country	Japan		
Commodity	Juice,		
	Orange		
Time period	Oct Sept.	Units:	Metric Tons
Imports for:	1998		1999
U.S.	20349	U.S.	14325
Others		Others	
Brazil	58739	Brazil	82897
Israel	247	Israel	116
Australia	119	Australia	487
Mexico	534	Mexico	301
Italy	277	Italy	429
		Belize	1590
		Netherlands	796
Total for Others	59916		86616
Others not Listed	1439		241
Grand Total	81704		101182

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Fresh Orange Wholesale Price Table

Prices Table			
Country	Japan		
Commodity	Fresh Oranges		
Prices in	Yen	per uom	KG
Year	2000	2001	% Change
Jan	155		7.74%
Feb	135	168	24.44%
Mar	128	174	35.94%
Apr	141	198	40.43%
May	151		-100.00%
Jun	149		-100.00%
Jul	147		-100.00%
Aug	146		-100.00%
Sep	147		-100.00%
Oct	158		-100.00%
Nov	173		-100.00%
Dec	176		-100.00%
Exchange Rate	124.02	Local currency/US \$	

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Fresh Grapefruit PS&D Table

PSD Table						
Country	Japan					
Commodity	Fresh Grapefruit				(HECTARE TREES)(100	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	0	0	0	0	0	0
Imports	266	266	274	270	275	265
TOTAL SUPPLY	266	266	274	270	275	265
Exports	0	0	0	0	0	0
Fresh Dom. Consumption	266	266	274	270	275	265
Processing	0	0	0	0	0	0
TOTAL DISTRIBUTION	266	266	274	270	275	265

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#### **Grapefruit Juice PS&D Table**

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PSD Table						
Country	Japan					
Commodity	Juice, Grapefruit				(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Deliv. To Processors	0	0	0	0	0	0
Beginning Stocks	2000	2000	2000	2000	2000	2000
Production	0	0	0	0	0	0
Imports	16647	16647	20519	20592	22000	22000
TOTAL SUPPLY	18647	18647	22519	22592	24000	24000
Exports	0	0	0	0	0	0
Domestic Consumption	16647	16647	20519	20592	22000	22000
Ending Stocks	2000	2000	2000	2000	2000	2000
TOTAL DISTRIBUTION	18647	18647	22519	22592	24000	24000

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Fresh Grapefruit Import Trade Matrix

rresn Grapeiruit	ımport 1 rade	· Matrix	
Import Trade Matrix			
Country	Japan		
Commodity	Fresh Grapefruit		
Time period	Oct Sept.	Units:	Metric Tons
Imports for:	1998		1999
U.S.	213060	U.S.	213561
Others		Others	
Israel	15423	Israel	18386
South Africa	30062	South Africa	32218
Swaziland	7326	Swaziland	5727
Cuba	422	Cuba	429
New Zealand	4	New Zealand	4
China	17	China	22
Total for Others	53254		56786
Others not Listed	22		1
Grand Total	266336		270348

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**Grapefruit Juice Import Trade Matrix** 

Grapetruit Juice	Import Trade	Matrix	
Import Trade Matrix			
Country	Japan		
Commodity	Juice, Grapefruit		
Time period	Oct Sept.	Units:	Metric Tons
Imports for:	1998		1999
U.S.	14759	U.S.	17231
Others		Others	
Israel	960	Israel	1573
		Australia	199
		Cuba	843
Total for Others	960		2615
Others not Listed	1015		746
Grand Total	16734		20592

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Fresh Grapefruit Wholesale Price Table

Prices Table			
Country	Japan		
Commodity	Fresh Grapefruit		
Prices in	Yen	per uom	KG
Year	2000	2001	% Change
Jan	142	132	-7.04%
Feb	136	139	2.21%
Mar	144	163	13.19%
Apr	144	169	17.36%
May	134		-100.00%
Jun	128		-100.00%
Jul	141		-100.00%
Aug	143		-100.00%
Sep	126		-100.00%
Oct	143		-100.00%
Nov	171		-100.00%
Dec	145		-100.00%
Exchange Rate	124.02	Local currency/US \$	

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#### Fresh Lemon PS&D Table

Tresh Lemon 1 500 Table						
PSD Table						
Country	Japan					
Commodity	Fresh Lemons				(HECTARE TREES)(100	/ \
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	2	2	2	2	2	2
Imports	86	86	90	92	90	90
TOTAL SUPPLY	88	88	92	94	92	92
Exports	0	0	0	0	0	0
Fresh Dom. Consumption	88	88	92	94	92	92
Processing	0	0	0	0	0	0
TOTAL DISTRIBUTION	88	88	92	94	92	92

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#### Lemon Juice PS&D Table

PSD Table						
Country	Japan					
Commodity	Juice, Lemon				(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Deliv. To Processors	0	0	0	0	0	0
Beginning Stocks	2000	2000	2000	2000	2000	2000
Production	0	0	0	0	0	0
Imports	10647	10647	10900	10894	11000	11000
TOTAL SUPPLY	12647	12647	12900	12894	13000	13000
Exports	0	0	0	0	0	0
Domestic Consumption	10647	10647	10900	10894	11000	11000
Ending Stocks	2000	2000	2000	2000	2000	2000
TOTAL DISTRIBUTION	12647	12647	12900	12894	13000	13000

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Fresh Lemon Import Trade Matrix

Fresh Lemon Imp			1
Import Trade			
Matrix			
Country	Japan		
Commodity	Fresh		
	Lemons		
Time period	Oct Sept.	Units:	Metric Tons
Imports for:	1998		1999
U.S.	74665	U.S.	74276
Others		Others	
Chile	5618	Chile	10079
Australia	2147	Australia	1297
South Africa	2644	South Africa	4720
New Zealand	941	New Zealand	1015
Spain	248	Spain	219
			+
Total for Others	11598		17330
Others not Listed	3		3
Grand Total	86266		91609

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**Lemon Juice Import Trade Matrix** 

Lemon Juice Imp	ort Trade Ma	trix	
Import Trade Matrix			
Country	Japan		
Commodity	Juice, Lemon		
Time period	Oct Sept.	Units:	Metric Tons
Imports for:	1998		1999
U.S.	998	U.S.	1397
Others		Others	
Israel	4342	Israel	4614
Italy	3446	Italy	2359
Argentine	1607	Argentine	2256
Total for Others	9395		9229
Others not Listed	253		268
Grand Total	10646		10894

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#### Fresh Lemon Wholesale Price Table

Prices Table			
Country	Japan		
Commodity	Fresh Lemons		
Prices in	Yen	per uom	KG
Year	2000	2001	% Change
Jan	258	166	-35.66%
Feb	242	159	-34.30%
Mar	224	158	-29.46%
Apr	213	212	-0.47%
May	189		-100.00%
Jun	195		-100.00%
Jul	280		-100.00%
Aug	284		-100.00%
Sep	217		-100.00%
Oct	181		-100.00%
Nov	171		-100.00%
Dec	171		-100.00%
Exchange Rate	124.02	Local currency/US \$	

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### **Trade Tables**

Fresh Orange Imports for the October-February Period

210011 0101190 21111	resh Grange imports for the October residually refloa							
0805.10-000 (Fresh	h Oranges)							
	1999	2000		2000	2001			
(MT)	10/99-12/99	1/00-2/00	10/99-2/00	10/00-12/00	1/01-2/01	10/00-2/01		
World	9,037	22,446	31,483	15,905	17,870	33,775		
United States	4,918	21,949	26,867	11,494	17,595	29,089		
South Africa	0	0	0	290	0	290		
Australia	3,917	0	3,917	3,558	0	3,558		
Spain	0	458	458	0	275	275		
Mexico	0	0	0	0	0	0		
Swaziland	0	0	0	48	0	48		
New Zealand	103	0	103	45	0	45		
Chile	100	20	120	471	0	471		

Fresh Grapefruit Imports for the October-February Period

Tresh Grupenan	imports for the	te detabel 1 t	staarj rerioa		T			
0805.40-010 (Fre	0805.40-010 (Fresh Grapefruit)							
	1999	2000		2000	2001			
(MT)	10/99-12/99	1/00-2/00	10/99-2/00	10/00-12/00	1/01-2/01	10/00-2/01		
World	39,470	54,487	93,957	41,399	36,191	77,590		
United States	23,997	51,413	75,410	27,088	34,572	61,660		
Israel	14,960	3,074	18,034	14,181	1,618	15,799		
South Africa	84	0	84	58	0	58		
Swaziland	18	0	18	0	0	0		
Cuba	429	0	429	38	0	38		
New Zealand	0	0	0	0	0	0		

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Fresh Lemon Imports for the October-February Period

	1					
0805.30-010 (Fre	esh Lemons)					
	1999	2000		2000	2001	
(MT)	10/99-12/99	1/00-2/00	10/99-2/00	10/00-12/00	1/01-2/01	10/00-2/01
World	17,816	14,439	32,255	17,862	12,528	30,390
United States	17,213	14,251	31,464	16,817	12,528	29,345
Chile	288	21	309	921	0	921
Australia	46	0	46	35	0	35
South Africa	0	0	0	0	0	0
New Zealand	269	62	331	88	0	88
Spain	0	102	102	0	0	0
Mexico	0	0	0	0	0	0

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Orange Juice Imports for the October-February Period

Orange suice		ie October-Fe	ebruary Perio	ou 		
2009.11-210 (	Orange Iuice -	Single - Froze	en)			
2009:11 210 (	1999	2000	211)	2000	2001	
(KL)	10/99-12/99	1/00-2/00	10/99-2/00	10/00-12/00	1/01-2/01	10/00-2/01
World	482	348	830	440	215	655
United States	364	242	606	288	58	346
Brazil	0	68	68	0	0	0
Israel	0	0	0	0	0	0
Australia	0	0	0	5	0	5
Mexico	0	0	0	0	0	0
Italy	102	38	140	124	127	251
Others	16	0	16	23	30	53
2009.11-290 (		Î	Frozen)	• • • • • • • • • • • • • • • • • • • •	• • • • • • • • • • • • • • • • • • • •	
(171)	1999	2000	10/00 2/00	2000	2001	10/00 2/01
(KL)	10/99-12/99	1/00-2/00	10/99-2/00	10/00-12/00	1/01-2/01	10/00-2/01
World	11,121	7,893	19,014	·	6,807	16,818
United States	2,535	1,916	4,451	2,225	900	3,125
Brazil	8,471	5,855	14,326	7,647	5,649	13,296
Israel	0	0	0	10	0	10
Australia	0	0	0	0	0	0
Mexico	53	35	88	89	70	159
Italy	26	52	78	26	162	188
Belize	0	0	0	0	0	0
Others	36	35	71	14	26	40
2009.19-210 (	Orange Juice -	Single - Not F	Frozen)			
Ì	1999	2000	,	2000	2001	
(KL)	10/99-12/99	1/00-2/00	10/99-2/00	10/00-12/00	1-2	10/00-2/01
World	302	213	515	932	494	1,426
United States	51	31	82	41	30	71
Brazil	0	0	0	0	0	0
Israel	0	0	0	0	28	28
Australia	250	173	423	674	329	1,003
Mexico	0	0	0	0	0	0
Italy	0	0	0	3	0	3
Netherlands	0	0	0	149	63	212

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Others	1	9	10	65	44	109
2009.19-290 (	Orange Juice -	Concentrated	- Not Frozen)			
	1999	2000		2000	2001	
(KL)	10/99-12/99	1/00-2/00	10/99-2/00	10/00-12/00	1/01-2/01	10/00-2/01
World	10,101	1,154	11,255	7,190	12,473	19,663
United States	4	1	5	6	0	6
Brazil	9,889	1,118	11,007	7,174	12,471	19,645
Israel	0	0	0	0	0	0
Australia	16	0	16	0	0	0
Mexico	0	0	0	0	0	0
Italy	0	0	0	2	0	2
Netherlands	190	34	224	0	0	0
Others	2	1	3	8	2	10

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**Grapefruit Juice Imports for the October-February Period** 

			J		1	· ·
2009.20-210 (	Grapefruit Juic	e - Single)				
	1999	2000		2000	2001	
(KL)	10/99-12/99	1/00-2/00	10/99-2/00	10/00-12/00	1/01-2/01	10/00-2/01
World	1,151	942	2,093	1,128	956	2,084
United States	436	111	547	46	140	186
Israel	557	766	1,323	471	531	1,002
Australia	138	59	197	327	178	505
Others	20	6	26	284	107	391
2009.20-290 (	Grapefruit Juic	e - Concentra	te)			
	1999	2000		2000	2001	
(KL)	10/99-12/99	1/00-2/00	10/99-2/00	10/00-12/00	1/01-2/01	10/00-2/01
World	2,582	1,324	3,906	3,507	1,188	4,695
United States	2,401	1,165	3,566	3,259	956	4,215
Israel	46	37	83	216	71	287
Cuba	0	14	14	28	85	113
Others	135	108	243	4	76	80

**Lemon Juice Imports for the October-February Period** 

Ecinon suice	imports for th	c October-re	bruary rerio	u .		
2009.30-211 (	Lemon Juice)					
	1999	2000		2000	2001	
(KL)	10/99-12/99	1/00-2/00	10/99-2/00	10/00-12/00	1/01-2/01	10/00-2/01
World	1,910	1,311	3,221	2,082	973	3,055
United States	188	163	351	111	154	265
Israel	619	466	1,085	1,004	450	1,454
Italy	453	339	792	495	84	579
Argentine	487	335	822	306	271	577
Others	163	8	171	166	14	180